SITUATION

Creative Technologies provides integrated client portal and practice management solutions for over 150 financial planning and wealth management firms in the UK.

At commencement of the engagement, Creative Technologies had approximately 40 development staff spread across three primary platforms and was growing quickly.

Although there was the concept of development 'teams'; these were really groups of people each working on items individually.

These 'teams' were running 3 week sprints, with the two main products each operating on a different cadence.

There was a sudo-agile methodology in place where scrum ceremonies took place but development was done in large batches with considerable up-front design.

Despite significant platform integrations, there was minimal tracking of dependencies.

Prioritisation was driven by Technology teams and sprint refinement sessions were not taking place which led to overwhelming amounts of change late in development when the business came to sign off.

There were neither automated, nor manual test scripts which lead to an ad-hoc testing culture based squarely around individual knowledge of the product.

Creative Technologies

About Creative Technologies

- Financial technology provider
- Horsham & Brighton, England
  www.creative-technologies.co.uk

Objectives

- Increase predictability of product delivery commitments to clients and regulators
- Improve quality and stability of product suite
- Digitally transform to support significant scaling of development

Approach

- Implement a scaled agile framework and a continuous delivery pipeline

Results

- Boosted predictability of delivery commitments
- Accelerated time to market
- Increased quality of production functionality

Creative Technologies undertakes a digital transformation to stay ahead of competition.

Creative Technologies selects Agilicist as their digital transformation partner to help them increase agility and innovation.

In the highly regulated financial environment, meeting delivery dates was crucial to maintain compliance, however planning was ad-hoc and never more than a sprint ahead which led to a mismatch of expectations and failure to deliver on time.

There was a heavy reliance on key individuals, product was getting to market but in a rather unpredictable way and customer expectations were often not met.

There was a culture of overtime and stopping everything to work on the new highest priority which led to disfunction and lack of trust.

- *We were looking for a company to help expand our business. Agilicist had the right blend of agile delivery knowledge and practical experience to help us but the game changer was their energy and enthusiasm.* ”

Carl Davies
Managing Director

CHALLENGE

Creative Technologies wanted to implement a framework that allowed them to become more adaptable to the changing needs of their customers whilst maintaining their ability to meet significant regulatory demands. They required a delivery mechanism that allowed for continued innovation, but was also highly predictable in order to meet numerous fixed deadlines.

ACTIONS

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Following initial consultations and workshops with senior executives, several deep dives into current development processes, and a walk-through of proposed projects, Agilicist consultants recommended the Scaled Agile Framework (SAFe) as an initial first step towards organisational agility.

The transformation involved the following:

- **Leadership coalition formed and senior leaders trained and certified in SAFe**
  The new way of working was very different to the traditional structure and practice. To ensure alignment, it was vital that leadership embraced the new process and were actively engaged in the implementation, so they could make decisions that acknowledged foundational lean-agile principles

- **Team and programme structure defined and pilot release train launched**
  Siloed development units were transformed into four preliminary scrum teams who were supported by a further 'systems' team. These teams were primarily component based initially; comprised of personnel who had specific platform skills alongside members who had broader expertise with the objective to build up cross-functional skills over time.

- **Project pipeline streamlined and programme backlog prioritised based on economic outcomes**
  An initial list of over 150 large initiatives was reduced by 80% by ensuring focus was placed on those projects that were in complete alignment with current business strategy. A bespoke prioritisation model was used to sequence features for maximum economic benefit, and priorities were continuously communicated to teams and updated throughout delivery to ensure alignment.

- **Compliance and regulatory work was built into requirements**
  Compliance concerns were built directly into the development process: teams would plan any manual compliance work as part of their backlogs and reviews were

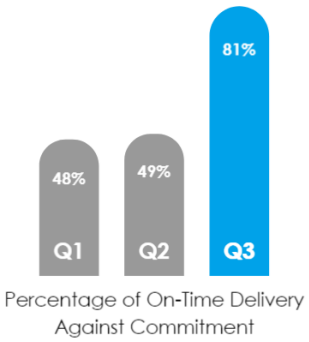
conducted as the solution was being built to verify and validate and ensure fast feedback.

- **PI Planning events on a 12 week cadence were initiated**
  Teams and stakeholders attended collaborative planning events which took place quarterly. Senior leaders presented the overarching organisational strategy and the product team gave business context to the prioritised list of candidate work items. Teams aligned their plan to the outcomes the business wanted to achieve.

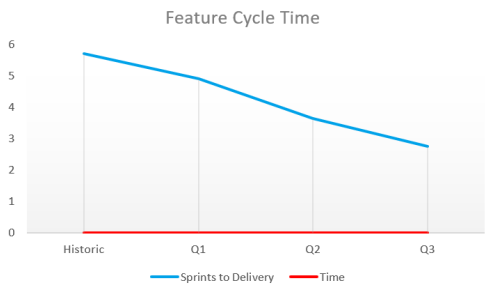
- **Automation test suites introduced**
  Heavy manual testing procedures were incrementally replaced by automated scripts to allow for faster feedback and increased build quality.

- **CI/CD deployment pipeline established**
  Agilicist spearheaded a new deployment approach that involved developers integrating code into a shared repository on a daily basis and using 'feature flags' to integrate incomplete changes. Teams became responsible for deploying their own code rather than handing it over to a centralised Dev Ops team.

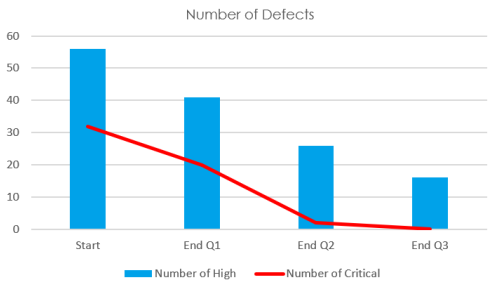
RESULTS



Delivery predictability of committed value



Time to market reduced by 52%



81.33% decrease in critical and major defects

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increased from 48% to 81% by end of Q3